

**Directions:** Please complete shaded areas below.

**Department Name:** Finance, Tax Collector  
**Project Name:** Tax Collector IVR, Customer Payment, & Information  
**Project Amount:** \$325,000  
**Preparer Name & Contact Information:** Carl Strowd, (305) 375-4748

## Section B

**(Complete Only If Asking for Revenue from GF Capital or IT Administrative Fee)**

### Improves Customer Service

Describe how the other customer departments will be better served by implementing this initiative.

*As the prime source of County's General Fund revenue, as well as other special revenues including over \$60m annually in Convention & Tourism tax revenue and over \$70m in Occupational License revenue, the Tax Collector plays a crucial role by collecting and distributing this revenue that funds County departments and initiatives. Beyond this, it should be noted that we are the number one collection source for the school board, other municipalities and various state agencies. By improving the revenue flow, the various departments served by the general fund, municipalities, school board and tax authorities and state agencies can receive more timely distributions.*

### Impacts Citizens

Describe how this initiative will simplify or enhance doing business with the County. Also state how this will enhance public perception

*This initiative will better serve our customers in a number of ways.*

*First, it addresses the main source of complaints by our customers, this being long lines and long waiting times. By providing the ability to pay by telephone, these long lines during peak periods can be avoided. By providing customers with a confirmation number that can be cross-referenced into the system, they will be assured that their payment was processed in a timely manner. Second, it addresses the need for citizens who do not have Internet access. While the number of home based personal computers with Internet access is impressive, everyone owns a landline phone, cellular phone, or both. The new system will be useful for people without personal computers as well as those who are worried about mailing their payments in at the last minute. Third, by providing faster, more efficient service with a greater variety of payment means, our customers will be impressed with the enhanced level of service that they receive from this office*

### Improves Business Processes

State how this project will lower costs, speed up key business processes, and/or improve decision making ability. Also indicate if the initiative will improve employee morale, communication, and/or education.

*Electronic phone payments reduce manual in-house collection processes and recording. As the funds are being guaranteed, the county avoids the time-consuming process of collecting on bad checks, thereby reducing administrative costs, correspondence costs and postage. Electronic payment reduces the amount of over and underpayments, minimizing the number of customer errors. Our employees can therefore be utilized more productively while customer satisfaction and perception will increase because of fewer overall errors.*

### **Strategic Alignment to the County's Goals**

Describe how this IT Investment lines up with the realization of the County's goals and objectives.

*Implementation of this system complies with the Finance Department related Strategic Plan goal ES8 and ED4 i.e. "ensuring the financial viability of the County through sound financial management" and "by creating a more business-friendly environment within the County." Another County goal is to maximize the use of online services for customer convenience and efficient processing. The Tax Collector's IT department intends to improve the efficiency by which the money is collected from the citizens. This would be integral to both goals.*

### **Departmental Participation**

State if this project crosses departmental boundaries. Indicate how many other departments will participate in the initiative. Please specify which departments and funding commitments if any.

*The IVR upgrades do cross departmental boundaries. Team Metro's 311 center will be greatly assisted by the new system answering thousands of customer inquiries per week. An expanded system to eventually include the Occupational License and Auto Tag Sections of the Tax Collector's will provide service consistency for all services that the Tax Collector provides.*

### **Risks**

Indicate any risks involved to include procurement delays, personnel delays, and environmental delays to include change of technology, vendors, etc.

*We believe that there should be minimal risks involved with this project as it is merely an extension to an existing system. In addition, as we have already been through the Procurement process there should be minimal delays in this area as the proposal is an addition to what we already have. With any project that involves a vendor, there is always the possibility that a delay could appear at some stage but the likelihood of this occurring in this case is relatively low.*

### **Use of an Enterprise Infrastructure**

Will this solution utilize an enterprise infrastructure already in place (yes or no)? Please explain.

*Yes. These are enhancements to the County's existing IVR system and will also interface with our FAMIS enterprise financial system to register payments as well as provide information to the customer as requested.*

## Section C

### Financial Information

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ETSD Dependencies (See Budget Manual)	FY04-05	FY05-06
Infrastructure		\$75,000
Application Programmer		\$200,000
Database		\$25,000
Telecommunication		\$25,000
Radio		
Etc.		

Department Specific Costs	FY04-05	FY05-06
Personnel		
Hardware		
Software		
Maintenance Fees		
Consultant Fees		
Etc.		